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The Wellcome Trust

Its Origin and Functions

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Its Origin and Functions

1967

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The Wellcome Trust

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Origin of the Trust

The Wellcome Trust was created by the will of Sir Henry Solomon Wellcome, who died in 1936. An American by birth who became a British subject, Wellcome at the time of his death was sole proprietor of the world-wide pharmaceutical business of Burroughs Wellcome and Company, which he had founded in London with a fellow-American, Silas Mainville Burroughs, in 1880. The partnership with Burroughs ended with the latter's death in 1895, and in 1924 the business was registered by Wellcome under the title of The Wellcome Foundation Limited.

Under the terms of Wellcome's will the entire share capital of The Wellcome Foundation Limited, with its associated concerns at home and abroad, is vested in Trustees, who are instructed to use the distributed profits for the advancement of research work in human and animal medicine and in related subjects anywhere in the world. (See Appendix, p. 20.)

The history of medicine was a special interest of Sir Henry Wellcome, and the Trustees own the Wellcome Historical Medical Museum and Library, housed in the Wellcome Building in Euston Road, London (see p. 17). In addition the Trustees provide support for research in the history of medicine.

In a world in which there are many charitable foundations, it is not surprising that there is much public confusion between the names and purposes of The Wellcome Trust and of The Wellcome Foundation Limited. The Wellcome Trustees are the sole shareholders of The Wellcome Foundation Limited. In a nutshell, The Wellcome Foundation Limited, a pharmaceutical manufacturing and trading business, earns the money which The Wellcome Trust, a grant-making charity, spends.

Policy

The Wellcome Trustees consider that one of the principle aims in the administration of the funds of the Wellcome Trust as a charitable foundation is to give flexibility to the methods by which medical research is financed. Their intention is to support promising new advances and inadequately supported or interdisciplinary subjects which offer opportunities for development, until such time as these can be absorbed into regular budgets. They do not consider it to be their function to make up the deficiencies created in regular budgets by inadequate allocations from public funds.

Until now the Trust has used most of its funds by way of grants to support projects put forward by individual research workers. These grants have normally been given on a short-term basis. Each application has been assessed on its scientific quality and importance, and awards have been made for those projects which were judged most promising by these criteria.

The Trustees intend to continue to allocate a large proportion of the funds of the Trust in this way because they believe that the mainspring of new developments will usually be the ideas of individual researchers. The basic and clinical sciences of medicine will continue to receive help as men and projects of high scientific quality can be identified.

In addition, however, the Trustees plan in future to initiate research into certain selected problems, whether at home or abroad, which seem to them to be of particularly high promise and which may require support for longer periods than normal. The following spheres of research give an indication of possible directions in which the Trustees could provide support:

- (i) Inadequately supported subjects
- (ii) Interdisciplinary subjects
- (iii) Linking established centres and field research overseas
- (iv) Health and disease problems in tropical countries
- (v) Veterinary medicine and animal nutrition.

Types of Assistance Considered:

The normal types of assistance which the Trustees consider may be grouped as follows:

- A. Capital grants for building projects
- B. Provision of research equipment
- C. Support or endowment of senior research posts
- D. Research fellowships and scholarships
- E. Grants for research expenses and assistance
- F. Travel grants
- G. Grants in aid of symposia
- H. Grants to assist publication
- I. Grants for research museums and libraries
- J. Grants for research in the history of medicine

The Trustees do not normally subscribe to funds which are being collected from miscellaneous sources or by general appeal.

A. Buildings

Applications for capital grants for buildings will be considered if the accommodation is required for a programme of research in which the Trustees are particularly interested. The Trustees take the view that, in general, laboratory space for research workers paid from public or other funds should be provided from these sources. The Trustees will not make capital grants for buildings which are essentially for educational, as against research, purposes or for the treatment of patients except where the treatment itself forms part of the programme of research.

The Trustees have sometimes been willing to provide part of the cost of a building project of which the balance was to be met from other named sources. In such cases, however, they

expect the section of the building provided by the Trust to be readily identifiable.

Any sum which the Trustees may agree to provide for a building project will usually be regarded as their final liability in respect of that project, even if the cost of the building should in the event be found to exceed the estimate on which the grant was based. It is important, therefore, that the estimates presented in support of an application for a grant for building should be complete and inclusive.

Applications for capital grants for buildings should follow the general lines given on p. 15. They should, however, normally be made or supported by the Vice-Chancellor, Dean, or other appropriate senior administrative officer. They should include 12 copies of a memorandum giving full particulars of the long-term research programme for which the building is required. Details of architects plans and finance are not expected initially but a sketch of the plans proposed is useful. When an application has been given preliminary consideration by the Trustees, and is accepted for submission in full, more detailed plans and costings will be required.

The Trustees expect to receive annual progress reports up to the date of completion.

B. Research Equipment

The Trustees are prepared to consider requests for grants to purchase items of special equipment needed for research, when they are satisfied that the cost of such equipment cannot be provided from University or other sources.

When the cost of such equipment is substantial, it may be placed on indefinite loan with the institution or the worker receiving the grant; the ownership then remains with the Trust, and if the recipient worker should change his programme or

move to another centre, the Trustees wish to be consulted about the plans for future use of the apparatus. Less costly items of equipment may, at the discretion of the Trustees, be presented by the Trust to the institution in which the applicant works. In any event, the recipient institution or worker is responsible for the proper use, safe custody, and maintenance of the apparatus, and for its insurance where necessary.

Metal labels showing the source of the equipment can be obtained from the Trust's office on request.

When a piece of special research equipment provided by the Trust has been in use for one year, the Trustees expect to receive a report upon the investigations which it has facilitated.

C. Senior Research Posts

In the past the Trustees have endowed research chairs, for example at the London School of Hygiene and Tropical Medicine (Clinical Tropical Medicine) and the School of Pharmacy (Pharmacology) and in the United States (Clinical Biochemistry). Long-term permanent appointments have been exceptional, however. The Trustees' more usual practice has been to establish senior research posts within University departments by grants for stated periods of years, on the understanding that the University should be able to assume financial responsibility for the posts thereafter. For example in 1965 a grant of £5,000 per annum was allocated for seven years to establish a Chair of Experimental Pathology at University College Hospital Medical School, on the understanding that at the end of that time responsibility for the Chair would be taken over by the University.

D. Research Fellowships, Scholarships and Personal Grants

Delegated Awards: Veterinary

The Trustees have for many years made a block grant to the Animal Health Trust for the provision of Wellcome Research

Fellowships in veterinary medicine. The Fellowships are advertised annually by the Animal Health Trust, and inquiries should be addressed to that body. The awards are made by a special committee on which the Wellcome Trustees are represented.

Delegated Awards: Travelling

In a similar manner, the Trustees agreed to supplement the Medical Research Council's resources by providing funds to enable five Sir Henry Wellcome Travelling Fellowships to be awarded by that Council annually. These awards are made by the Council under conditions similar to those governing their other travelling fellowships. Inquiries about them should be addressed to the Council's headquarters office (20 Park Crescent, London, N.W.1.) from which the awards are advertised. Since this arrangement was established, it has become the Trustees' practice not to consider other applications for travelling fellowships reaching them from workers in the United Kingdom whose researches deal with problems of human medicine.

Direct Awards

The Trustees normally only consider applications for research fellowships when the application is for some special reason ineligible for aid from official sources. Workers from other countries whose research would be fostered by a period of training or investigation in the United Kingdom are a particular example, since other sources of support may not be available to them.

Each application for a fellowship or scholarship is considered on its merits in the light of the Trust's policy of promoting good research projects and assisting men of promise.

Scholarships

Research scholarships are occasionally awarded when for some special reason the applicant is unable to obtain support from

official sources. The terms of these scholarships are similar to those of the Medical Research Council.

Stipends

The stipends of Wellcome Research Fellowships are awarded on the following scale:

Age		London	Rest of England
24-27		£1,160	£1,100
		£1,260	£1,200
		£1,410	£1,350
		£1,510	£1,450
28-35 and over	Non-medical:	£1,760 x £100	£1,700 x £100
		to £2,560	to £2,500
	Medical:	£1,860 x £100	£1,800 x £100
		to £2,660	to £2,600

To qualify for a Wellcome Research Fellowship the candidate must be accepted by the Trustees as having attained the status of an independent research worker. When the Trustees consider this status has not been attained they will provide a stipend which is considered appropriate after negotiation with the department where the research will be undertaken.

Income Tax

Normally the Trust's Financial Secretary will propose that payment of stipends should be made by the host institution, the Trust providing sufficient funds for the purpose at agreed intervals. The stipends are ordinarily liable to income tax as earned income; but scholarships awarded to relatively junior workers, essentially for research training, may be exempted from such tax, at the discretion of the Inland Revenue Authorities.

Expenses

An allowance is usually made on request of up to £200 per annum for the expenses of a fellow's research programme, to cover University bench fees, consumable supplies, and travel to meetings within the U.K.

Wellcome Senior Research Fellowships

To encourage the application of modern research techniques to clinical problems, the Trustees in 1962 established the Wellcome Senior Research Fellowships in Clinical Science; and in 1966 inaugurated a further programme of Research Fellowships in Clinical Pharmacology. These Fellowships are intended for workers approximately of Lecturer status who have already shown unusual promise as investigators, and who might be deprived of further opportunity by lack of an academic vacancy in the U.K. at the appropriate time. Selection is made by the Trustees on the basis of nominations made to them by University professors in the relevant subjects. Direct applications by candidates for these awards are not considered.

Exchange Fellowships with Denmark and Sweden

There are two special reciprocal arrangements for travelling research fellowships in which the Trustees participate with a view to encouraging international co-operation in medical research; the Carlsberg-Wellcome Travelling Research Fellowships, arranged with the Carlsberg Foundation of Copenhagen in 1957, and the Wellcome-Swedish Travelling Research Fellowships, agreed with the Medical Research Council of Sweden in 1962. The fellowships in each case are tenable for one year, on an exchange basis, by workers from the respective countries, in any branch of the natural sciences bearing upon human and animal medicine. They are advertised in the U.K., Denmark and Sweden in the early Spring. Further information can be provided on request.

E. Research Expenses and Assistance

The Trustees have made a number of grants to independent workers in Universities and hospitals for the expenses of their investigations. Such grants may include provision for the payment of scientific or technical assistants. As with requests for personal grants from candidates within the U.K., it is usual for the Trust's officers to inquire whether an approach can

first be made to one or other of the Research Councils, unless the project is one in which the Trustees have a particular interest.

F. Travel Grants

In 1955 the Trustees introduced a system of Wellcome Research Travel Grants to assist experienced research workers on problems of human and animal medicine, or in related fields of experimental science, to pay short visits to other countries in connection with their researches, while receiving their usual emoluments from home sources; these grants have taken the form of contributions to the expenses of travel, and occasionally of subsistence for short periods. Less frequently, the Trustees have been willing to provide contributions towards the cost of travel (but not of subsistence) for workers who are going overseas to take up temporary research appointments for a year or so, and who intend subsequently to return to their own country.

Short-Term visits abroad which the Trustees may consider to qualify the applicant for receipt of a Wellcome Research Travel Grant include those planned to enable him (1) to acquire a new research technique; (2) to discuss his latest research findings with expert colleagues with similar interests; (3) to carry out a research study of short duration at a centre overseas in which the facilities for the particular investigation are exceptionally good; or (4) to take part in a small symposium, to be attended by leading investigators in the particular field.

Travel grants are not made to individuals for attendance at the larger international congresses; but, in respect of such meetings, the Trustees sometimes make block grants to the organizing committee of the appropriate Society to provide part of the travel expenses, especially for some of the younger participants.

It should be emphasized that travel grants from the Trust are awarded only in respect of journeys which are necessary for the furtherance of research work. They are not given to assist

travel abroad in quest of professional experience or of more general scientific contacts.

Application for a travel grant is made on a form, obtainable (with a copy of the Regulations governing the awards) from the Assistant Secretary, at the Trust's office.

G. Grants in aid of Symposia

Recognizing the great potential value of small scientific symposia, attended only by a small number of chosen experts, the Trustees occasionally give financial support for such meetings. These grants have been used, with the Trustees' approval, for the travelling expenses of those invited to attend such meetings, whether held in the U.K. or abroad, or for the costs of organizing the meeting, or, if appropriate, towards the cost of publishing the proceedings.

H. Grants to Assist Publication

To assist the publication of work which is of high scientific and scholarly quality, but of limited sales potential, the Trustees will consider making grants to the publishers or guaranteeing them against loss up to a specified amount. On other occasions the Trustees have made grants towards the cost of special illustrations, the publication of work in the history of medicine (in which the Trust has a special interest), and occasionally they have provided guarantees of limited amount and duration to assist the launching of important new scientific periodicals. Grants have also been made to assist with the expenses of compiling some work of particular importance.

I. Research Museums and Libraries

Occasionally the Trustees have made grants for the construction of medical research libraries and museums. The term "research museum" used in the Will is somewhat ambiguous. The Trustees interpret it with the emphasis on active research rather than as a depository for the exhibition of completed work.

J. Research in the History of Medicine

The history of medicine was a subject of particular interest to Sir Henry Wellcome, and the Trustees continue his interest by considering applications for the support of research, by providing fellowships or by building libraries to house historical collections. As they also provide for the upkeep of the unique Wellcome Collection, the amount which can be allocated in this field is sometimes limited.

Financial Scale of the Trust's Activities

The resources available for the charitable purposes of the Wellcome Trust consist of the distributed profits of The Wellcome Foundation Limited, together with an income from invested reserves. The average annual allocation for grants at present is about £1,200,000.

Method of Application

Further information about the Wellcome Trust may be obtained from the Secretary and his staff at 52 Queen Anne Street, London, W.1. (Telephone WELbeck 5721.)

In order to consider an application, the Trustees require information about the research programme concerned in sufficient detail to allow them to assess its scientific merit. The relationship of this research programme to work already in progress, and the facilities available at present should be given. Personal particulars of the applicant or of the principal personnel to be involved in the project must be included, and a justification must be made for the requirements listed. The financial assessment of the grant required must be realistic in relation to the project proposed, and sufficient detail should be given to permit the Trustees to assure themselves on this point.

The support of the appropriate head of department, or if the grant sought is a major one, of the head of the institution, should be obtained.

Where appropriate, key publications should be included with the application. If a detailed memorandum is submitted in support of an application for a major grant, twelve copies should be supplied.

Travel Grant Application Forms

Forms of application for the Wellcome Research Travel Grants with a copy of the regulations governing them, may be obtained from the office of the Trust.

Payment of Grants

Payment of grants sanctioned by the Trustees is arranged by the Financial Secretary, Mr. J. E. K. Clarke, F.C.A., whose address is c/o Messrs. Viney, Price & Goodyear, Empire House, St. Martin's-le-Grand, London, E.C.1. Correspondence on purely financial matters should be sent to him there.

Correspondence on all other matters should be addressed to the Wellcome Trust at 52 Queen Anne Street, London, W.1.

The Wellcome Historical Medical Library The Wellcome Historical Medical Museum

The Wellcome Building, Euston Road, London N.W.1.

Director: F. N. L. Poynter, Ph.D., F.R.S.L., F.L.A.

The Wellcome Historical Medical Library and Museum was founded by the late Sir Henry Wellcome, its first Director, and is now the property of The Wellcome Trust. Housed on the first, second and third floors of the Wellcome Building, it was first opened to the public in its original home in Wigmore Street in 1913. Since 1949 its rich historical and reference collections have been freely available to students and research workers in all branches of learning and from all countries.

The Library

The Library is devoted entirely to the history of medicine and the related sciences and has been built up over the past seventy years by purchase at public and private sales throughout the world, supplemented by gifts and bequests. As envisaged by its founder it was to be developed on a scale comparable to that of the great national collections. Within its own special field this aim has been accomplished, for every landmark in the history of medicine is represented by original texts.

It is estimated that the Library contains approximately 250,000 printed books, pamphlets and journals; 10,000 manuscripts (of which half are in Oriental languages); 100,000 autograph letters of medical and scientific interest; as well as other documents such as diplomas, certificates and proclamations. The Library also contains a fine collection of medical and scientific periodicals going back to the seventeenth century.

Work has been going on for many years in the preparation of a published catalogue of all the books in the Library printed before 1850. The first volume containing descriptions of 7,000 books printed before 1641, was published in 1962. The second, published in 1966, is the first of a series listing books printed

between 1641 and 1850. This volume describes 18,000 works by authors whose names come in the section A-E of the alphabet. Although for the present, the published catalogue is planned to end at the year 1850, this limit was set only to make the compilation of the catalogue and its publication a practical possibility. Since Wellcome's death in 1936, the Library's collections have been greatly expanded to complete representation of the revolutionary advances made during the past century.

Medical Americana

In 1961 the Trustees were able to purchase for the Library the remarkably comprehensive library of early American medical books formed by Dr. Francisco Guerra, who has been awarded a special Wellcome Research Fellowship so that he may prepare a catalogue of the collection for publication. This was the largest single purchase ever made for the Library and supplements the similar but much smaller library bought by Wellcome from Dr. Nicholas Leon more than forty years ago. The whole of the Library's American holdings are now brought together in the newly built "American Room", where they are available for study and research.

Manuscripts

The collection of original manuscripts in the Wellcome Library is also of great interest. It comprises more than 5,000 in Western languages dating from the eleventh century onwards, and about the same number in Oriental languages.

Catalogues of all these are being prepared. The first volume of the Catalogue of Western Manuscripts on Medicine and Science has already appeared (1962) and contains detailed descriptions of some 1,500 works written before 1650.

In the extension to the Library which was completed in September 1962 the Trustees also provided a special "Oriental Room" where books and manuscripts in Arabic, Persian,

Sanskrit, Chinese, Japanese and other Oriental languages are suitably housed and accessible to scholars. A *Catalogue of Arabic Manuscripts on Medicine and Science*, by Dr. A. Z. Iskandar of Cairo, has recently been published (1967).

The Museum

The Museum occupies the first and second floors of the Wellcome Building, as well as part of the ground floor and contains about a quarter of a million objects covering most aspects of the history of medicine from the earliest times to the present century, and some aspects of the history of the allied sciences. The Egyptian and Graeco-Roman material is representative and valuable, and from the period of the Renaissance onward the material is comprehensive. The microscope collection is one of the finest in existence, and covers the whole history of the optical microscope. The collection of surgical and medical instruments is very large, and includes the prototypes of many well-known instruments. There are also special collections associated with famous figures in the history of medicine and science, such as Pasteur, Jenner and Lister. In addition the Museum possesses many hundreds of paintings, some of which are of artistic importance, and a collection of 150,000 prints.

Owing to the size of the collection it is possible to show only a very small proportion at any one time. The exhibitions open to the public are designed to give some idea of its content; the remainder is organized in a series of study-collections which are readily accessible for research by specialists. Special exhibitions illustrating a particular historical theme or branch of medical or scientific knowledge are organized each year.

Arrangements for visits by organized parties or special groups from schools or universities may be made on request to the Assistant-Director.

The Museum and Library are open to the public from 10 a.m. to 5 p.m. on weekdays from Monday to Friday; and on Saturdays (except at Bank Holiday weekends) from 9.30 a.m. to 4.30 p.m.

APPENDIX

Extracts from the Will of Sir Henry Solomon Wellcome

(dated 29th February 1932)

Sir Henry Wellcome by his Will vested the whole of the share capital of The Wellcome Foundation Limited in his Trustees and, after providing for certain personal and specific bequests, directed that the whole of the dividends declared by the Foundation, after payment of the Estate Duty payable on his death, should, for all time, be devoted by his Trustees to the following purposes:

1. "... the advancement of research work bearing upon medicine surgery chemistry physiology bacteriology therapeutics materia medica pharmacy and allied subjects and any subject or subjects which have or at any time may develop an importance for scientific research which may conduce to the improvement of the physical conditions of mankind and in particular for the discovery invention and improvement of medicinal agents and methods for the prevention and cure of disorders and the control or extermination of insect and other pests which afflict human beings and animal and plant life in tropical and other regions and elsewhere. . . ."

2. "... the establishment and endowment and future maintenance of any new Research Museum or Library and for the purchase and acquisition of books manuscripts documents pictures and other works of art and other objects and things for such Research Museums or Libraries and for conducting researches and collecting information connected with the history of medicine surgery chemistry bacteriology pharmacy and allied sciences . . . every Research Museum or Library for the time being maintained . . . shall be carried on with the title of 'The Wellcome Research Museum' or 'The Wellcome Research Library' or such other title including the name 'Wellcome' as my Trustees may deem most appropriate. . . ."



